Aligning Personal Preferences with Service Plan Goals

Reinventing Quality

Oct 5, 2026

National Core Indicators (NCI)

NCI tools collect data on performance and quality of life indicators directly from:

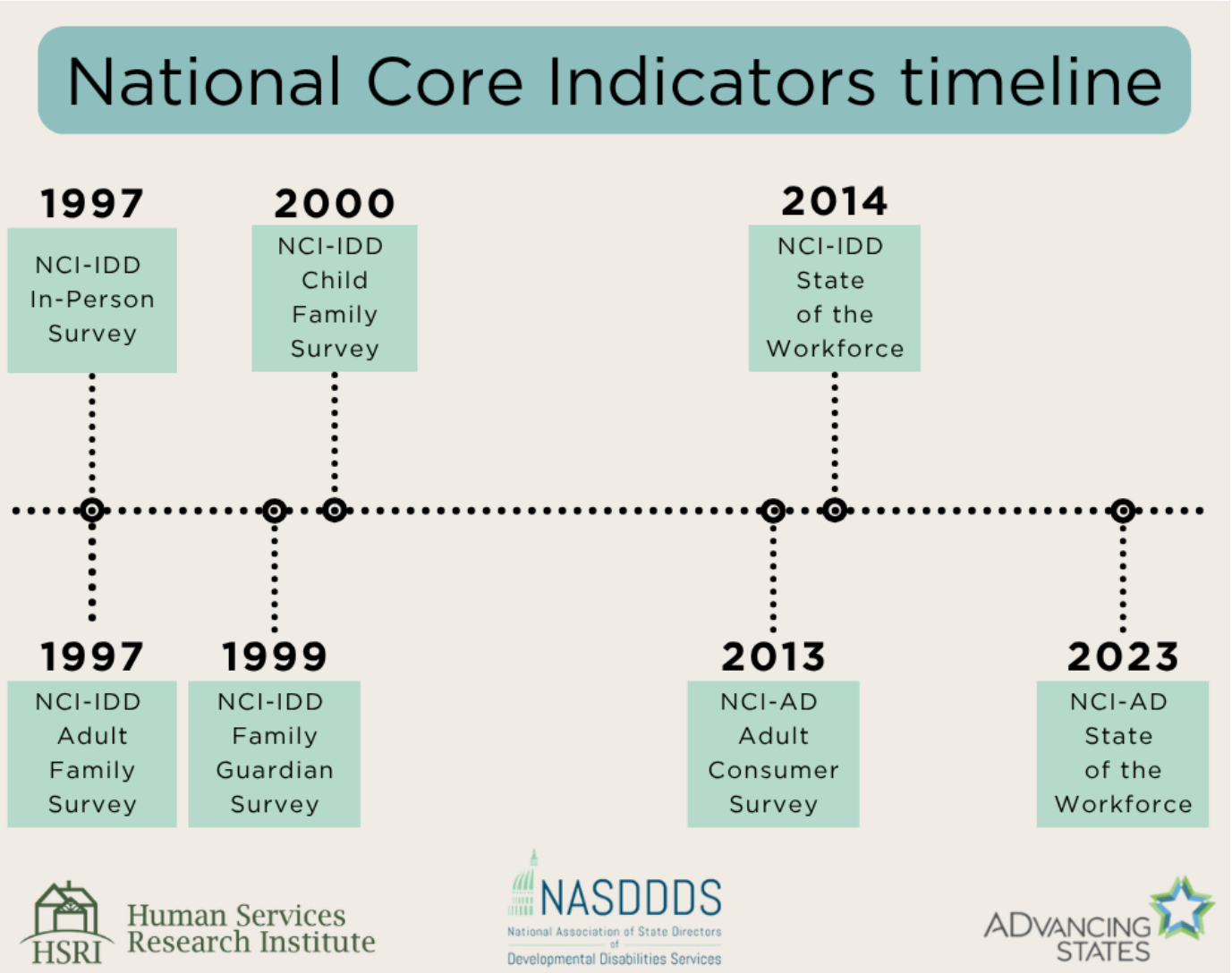
(1) people who use disability and/or aging services systems;

(2) families; and

(3) those who deliver services

Participating states:

- NCI-IDD IPS and Family Surveys: 48
- NCI-AD: 26
- State of the Workforce: 30 states for the NCI-IDD SoTW, and 6 states for NCI-AD SoTW

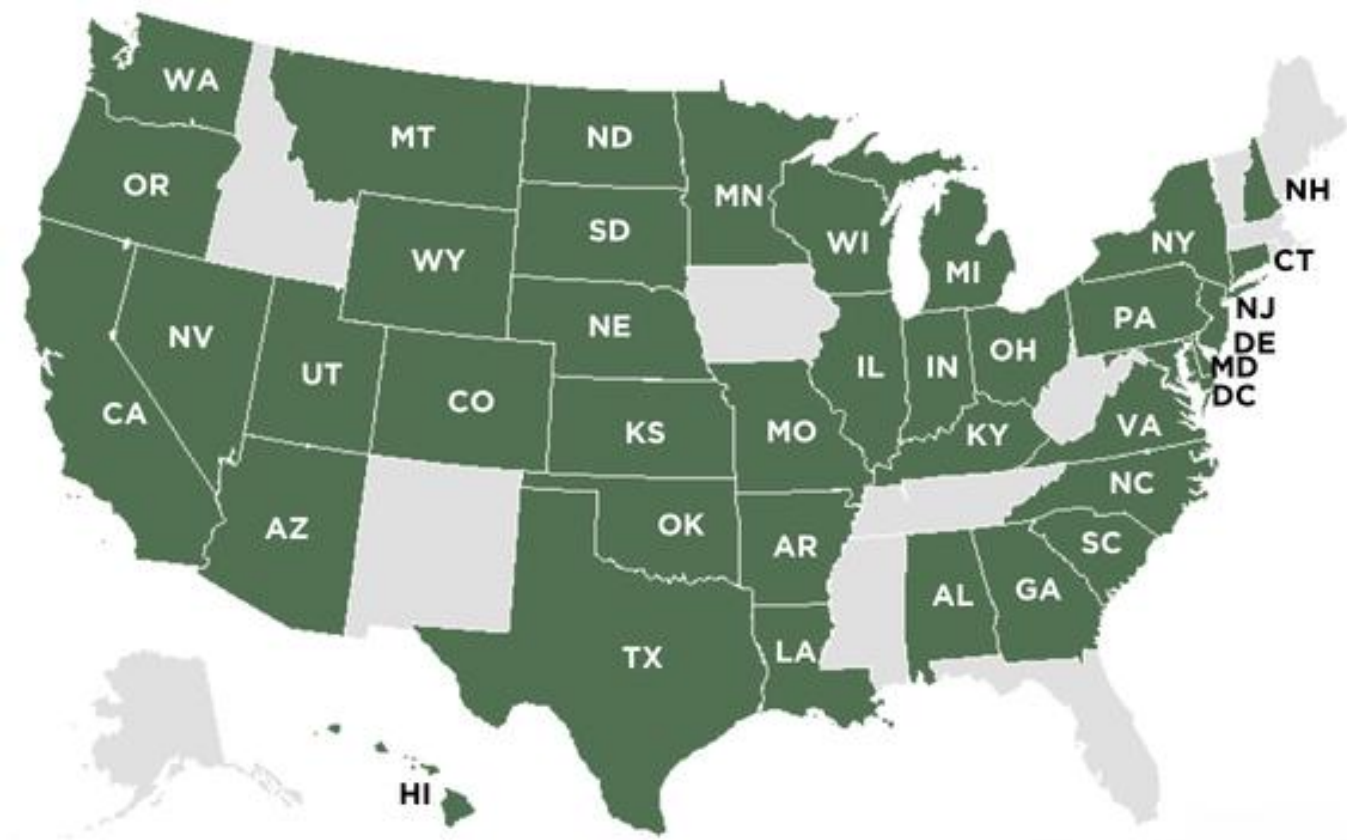


2024-2025 Sample – NCI-IDD IPS

30,888 total respondents

39 states

- **60% male**
- **Average age 40.6**
- **Race/ethnicity**
  - *65% White; 17% Black; 14 Hispanic or Latino*
- **Diagnosis**
  - *82% ID; 30% ASD*



Person-centered planning is the law

Centers for Medicare & Medicaid Services. (2014). Medicaid program; State plan home and community-based services, 5-year period for waivers, provider payment reassignment, and home and community-based setting requirements for community first choice and home and community-based services (HCBS) waivers (79 Fed. Reg. 2948).

Does a stated preference show up as a goal?

Four domains:

- employment, ADL / independence, friendship, community participation

States excluded: CA, MN, TX, WI

- ~40-100% missing on the goal questions

Unweighted, no Section I/II filter

N=19,699 in 35 states

Does the goal follow the preference?

	Wants it has the goal	**Doesn't want it** has the goal anyway	**Difference** percentage points
Employment	36.3%	12.9%	+23.4*
Friendship	57.2%	49.9%	+7.3*
Community participation	72.8%	69.1%	+3.7*
ADL / independence	76.9%	73.8%	+3.1

Share with a matching goal in the service plan.
Difference = how much more often the goal shows up when the person says they want it.
* 95% CI excludes 0. Unweighted.

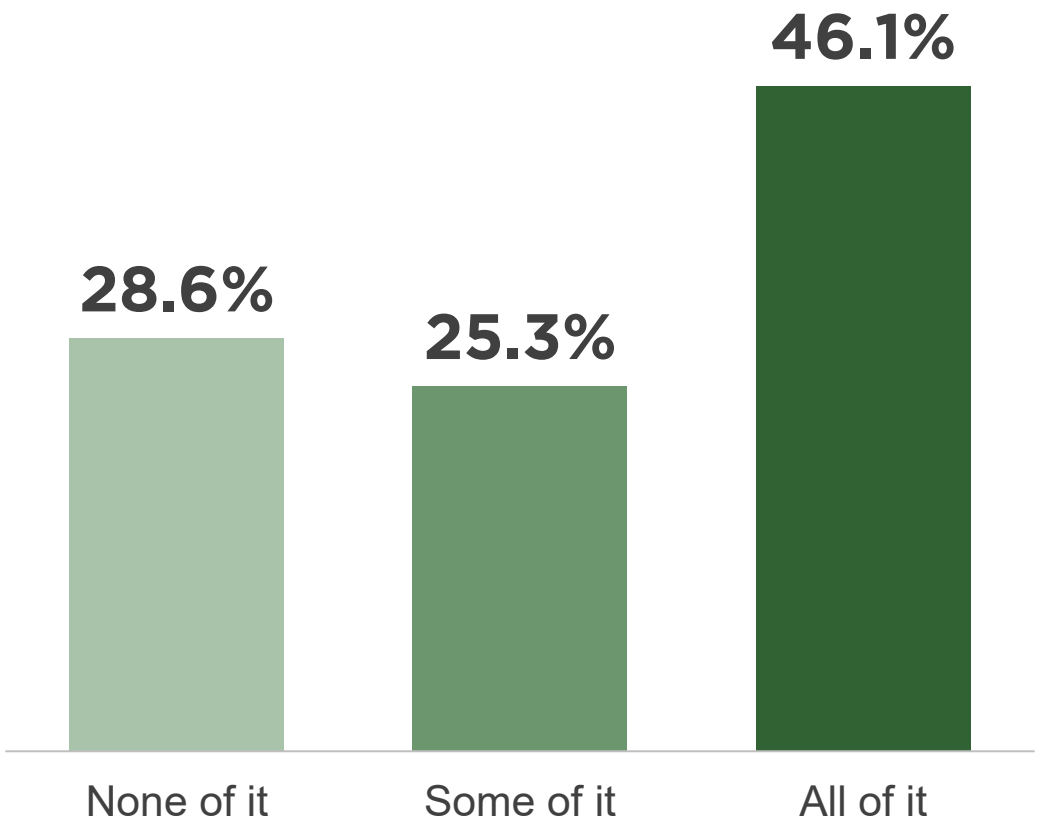
Goal vs. Preference vs. Policy

- **Employment goals follow what people ask for**
  - +23 points when the person wants a job
- **Community participation and ADL goals show up either way**
  - +3 to +4 points; about 7 in 10 who don't want more community involvement still have the goal
- **Some states require a community-participation goal in every plan by policy**
  - Plan compliance vs person-centeredness

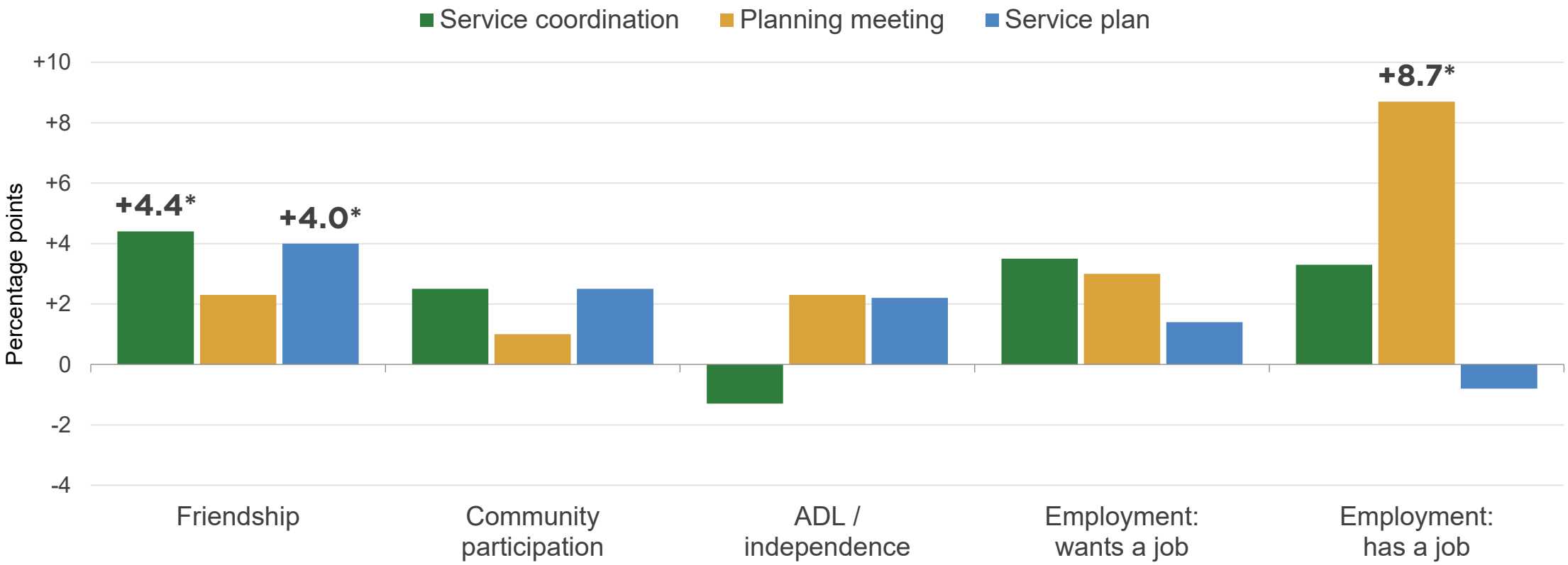
How much of what people want is in their plan?

Among 8,128 people who want at least one of the four:

- None as goals in the plan: 28.6%
- Some as goals: 25.3%
- All as goals: 46.1%



Planning experiences make only small differences



How much more often people who want it have the goal when all 3 scale items are yes vs. not (percentage points). * p < .05 (chi-square). Unweighted. Full numbers on the next slide.

What goes with alignment

Alignment (want it AND have the goal) in...	Service coordination met case manager, CM knows what matters, CM gets back to you		Planning meeting went to meeting, chose who came to meeting, understood what was said		Service plan has a plan, plan has what matters, helped make it	
	All 3 yes	Not all 3	All 3 yes	Not all 3	All 3 yes	Not all 3
Friendship	**58.5%***	54.1%	57.9%	55.5%	**58.4%***	54.4%
Community participation	73.4%	70.9%	72.5%	71.5%	72.2%	69.7%
ADL / independence	76.8%	78.1%	76.9%	74.6%	76.6%	74.5%
Employment: does not have a job, wants one	38.2%	34.7%	38.5%	35.4%	39.1%	37.7%
Employment: already has a job	61.2%	57.9%	**61.7%***	53.0%	61.3%	62.1%

% of people who want it who have the goal.
Columns: All 3 yes = yes to every item in the scale (fully person-centered). For people who already have a job, a goal to keep working counts.
* Difference $p < .05$ (chi-square). All percentages are unweighted.

What this means for states

- **Employment goals follow what people want; community participation and ADL goals mostly don't**
- **Person-centered planning experiences show only small differences in alignment between preferences and documentation**
  - Not every goal on paper reflects a genuine choice; some reflect what a policy requires
- **Open questions:**
  - How employment goals work for people already working,
  - Whether states want a shared way to track this

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Thank you